

Message Text

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INFO OCT-01 ISO-00 CIAE-00 EB-07 INR-07 LAB-04 NSAE-00

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TO USDOC WASHDC

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E.O. 11652: N/A

TAGS: BEXP, UK

SUBJECT: PROPOSED FY 1977 EVENT SCHEDULE

REF: (A) LONDON 2404; (B) LONDON 2782; (C) LONDON A-137
FEB 20, 1975 (D) LONDON 17445; (E) USDOC 17392;
(F) LONDON 17904; (G) LONDON 19395.

1. FOLLOWING PROPOSED PROGRAM IS BASED ON REVISED
DRAFT PROGRAM FOR FY 1977 SUBMITTED AS REF G.

1976

OCTOBER: IN-STORE PROMOTION (JENNERS, EDINBURGH)

OCT 1822: DATA COMMUNICATIONS - LTC

NOV. 15-19: SCIENTIFIC/INDUSTRIAL LAB INSTRUMENTS - LTC

DEC. 6-10: AGRICULTURAL EQUIPMENT CATALOG SHOW (ROYAL
SMITHFIELD SHOW, LONDON)

DEC. 7-10: OFDSHORE INTERNATIONAL '76 (NATIONAL
EXHIBITION CENTER, BIRMINGHAM: TYPE ONE SHOW)

1977

JAN. 10-14: ADVANCED ELECTRONIC COMPONENTS - LTC

FEB. 14-18: SECURITY SHOW - LTC

MARCH 14-18: AUTOMATED BUSINESS EQUIPMENT - LTC

APR. 25-29: CATERING & CONVENIENCE FOODS; SERVICES &
EQUIPMENT - LTC

MAY: 16-20: PLANT ENGINEERING & POLLUTION CONTROL

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SYSTEMS - LTC

JUNE 13-17: COMPUTER AIDED DESIGN - LTC

SEPT. 6-8: BUSINESS & AGRICULTURAL AIRCRAFT & ACCESSORIES.

(CRANFIELD AIP SHOW BIO WITH LTC & USIS)

SEPT. 19-24 MAJOR LTC SHOW (THEME TO BE DETERMINED)

2. PROPOSED ALTERNATE THEMES ARE AS FOLLOWS (A) MATERIALS TESTING AND QUALITY CONTROL EQUIPMENT; (B) ENERGY-SAVINGS MATERIALS AND EQUIPMENT. FIRST PROPOSED PER REF E; LAST THEME NEEDS MORE RESEARCH BUT HAS DEFINITE POTENTIAL.

3. FOLLOWING COMMENTS ON ABOVE-PROPOSED EVENTS AND PARTICULARLY THOSE NOT INCLUDED IN PARA 1 USDOC DRAFT PROGRAM CONTAINED IN REF E:

A. DATA COMMUNICATIONS: FAST MOVING TECHNOLOGY IN WHICH U.S. DOMINATES. U.K. POST OFFICE DECISION TO PROCEED WITH ALL-DIGITAL EXCHANGE SYSTEMS (SYSTEM X) IS IMPORTANT MOVE TOWARD INTEGRATING TELECOMS AND COMPUTERS, BUT INTERIM PROVISION OF POINT-TO-POINT PRIVATE WIRE CIRCUITS WILL HELP MEET BURGEONING DEMAND FOR DATACOMS SERVICES AND CREATE IMPORTANT SALES OPPORTUNITIES FOR U.S. EQUIPMENT SUPPLIERS. WORSENING POSTAL SITUATION AND SPIN OFF DEVELOPMENTS SUCH AS NORTH SEA OIL WILL HASTEN DEMISE OF LETTER-MAIL IN FAVOR OF DATA TRANSMISSION VIA TELECOMS. LTC EXHIBITION WOULD BE EXCELLENT FOLLOW-UP TO OCT. 1974 OPENING SHOW OF /LTC.

B. SCIENTIFIC AND INDUSTRIAL LAB INSTRUMENTS: UK WAS 29 MILLION DOLLAR MARKET FOR US LAB INSTRUMENTS IN 1974, 46 PERCENT RISE OVER PREVIOUS YEAR. TREND HAS BEEN STEADILY UPWARD SINCE 1971, AS US CURRENCY DEVALUATION COMBINED WITH TECHNOLOGICAL LEADS TO MAKE OUR LAB INSTRUMENTS INCREASINGLY COMPETITIVE. POSITION OF BOTH UK GOVERNMENT AND OPPOSITION IS THAT BRITAIN, AS EXPORT-DEPENDENT NATION, MUST MAINTAIN R AND D HEADWAY DESPITE PRESENT BUDGETARY PROBLEMS, WITH NATIONALIZED INDUSTRIES SETTING PACE. TO INDUSTRIAL ACTIVITY CAN

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BE ADDED IMPRESSIVE HMG ARRAY OF MILITARY AND CIVILIAN RESEARCH, PLUS ACTIVITIES OF ACADEMIC SECTOR (MOST OF IT GOVERNMENT-SUPPORTED). INTERPLAN STUDY (MAY 1975) ESTIMATES U.K. IMPORTS FROM US TO CLIMB FROM 22.2 MILLION DOLLARS THIS YEAR TO 31.8 MILLION DOLLARS IN 1979, WITH CONCURRENT RISE IN IMPORT MARKET SHARE FROM 46 TO 50 PERCENT. WE PARTICULARLY RECOMMEND ATTENTION TO PART FOUR OF THIS STUDY WHICH SETS OUT DEMAND BY

INDIVIDUAL INDUSTRY FOR TYPES OF INSTRUMENTS OVER NEXT
FIVE YEARS.

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C. AGRICULTURAL EQUIPMENT CATALOG EXHIBITION, ROYAL SMITHFIELD AGRICULTURAL SHOW, LONDON: THIS SHOW IS MORE DIRECTED TO DISTRIBUTOR/AGENT AUDIENCE THAN IS KENILWORTH SHOW. REPFIND NATURE OF CATALOG EVENT RECOMMENDS LONDON SITE, AS DO LOCATION (EARLS COURT) AND RELATIVE EASE OF CONSTRUCTION, SUPERVISION, STAFFING, ETC. IN LONDON AREA.

D. OFFSHORE EAS INTERNATIONAL 1976 TYPE ONE EXHIBITION, BIRMINGHAM (DEC. 7-10, 1976): STRONGLY SUPPORT SELECTION OF THIS EVENT FOR MAJOR PROMOTION OF GAS-RELATED EQUIPMENT. AS USDOC HAD JULY INTERNATIONAL TRADE FAIR BRIEFING BY LESLIE SMITH, WE WILL ONLY MENTION IN SUPPORT OF BIRMINGHAM PARTICIPATION BY DEPARTMENT OF ENERGY, OFFSHORE SUPPLIES DEPARTMENT, WELSH AND SCOTTISH OFFICES, AND MAJOR HMG LABORATORIES, PLUS REGIONAL DEVELOPMENT AUTHORITIES, WITH CENTRAL OFFICE OF INFORMATION COORDINATING GOVERNMENT AND QUASI-GOVERNMENT ACTIVITIES. WESTERN EUROPEAN GOVERNMENTS WILL HAVE NATIONAL STANDS, AND FINANCIAL TIMES/

PETROLEUM TIMES WILL MOUNT WELL-PUBLICIZED TECHNICAL CONFERENCE. ALSO WORTH MENTIONING EASTERN EUROPEAN INTEREST IN SHOW. NATIONAL EXHIBITION CENTER IS TAKING SHAPE AS HIGHLY ATTRACTIVE SHOW SITE. TIMING UNCLASSIFIED

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GOOD, WITH DATES COMFORTABLY AWAY FROM PETROTECH 76 (APRIL 6-9) AND WORLD GAS CONFERENCE IN LONDON (JUNE 7-11). OCTOBER 4-7 WORLD OFFSHORE EXHIBITION IN LONDON CONTINUES AS BURR UNDER SADDLE FOR BIRMINGHAM ORGANIZERS, BUT IN OUR VIEW EARLIER SHOW IS NOT COMPARABLE IN TERMS OF LOCATION, OFFICIAL SUPPORT, AND PROSPECTS FOR INDUSTRY PARTICIPATION.

E. ADVANCED ELECTRONIC COMPONENTS: U.S. EXPORTS OF ALL TYPES OF ELECTRONIC COMPONENTS TO UK TOTALLED 102 MILLION DOLLARS IN 1974, DESPITE UNFAVORABLE ECONOMIC CLIMATE, AND UP 76 PERCENT SINCE 1972. AS EXPORT-ORIENTED INDUSTRY, ELECTRONICS SHOULD BE ONE OF FIRST TO EXPERIENCE EFFECTS OF US/WESTERN EUROPEAN RECOVERY. LIKEWISE, MIDDLE EASTERN ORDERS FOR UK MILITARY EQUIPMENT, COMMUNICATIONS AND LANDING SYSTEMS, NAVAIDS, ETC., SHOULD PARTICULARLY BENEFIT MICROWAVE MANUFACTURERS. "FINANCIAL TIMES" STUDY IN JULY 1975 SAW UK TOTAL COMPONENTS DELIVERY REACHING 2.2 BILLION DOLLARS BY 1980. HARD MARKET RESEARCH ON HAND NEEDS THOROUGH UP-DATING, HOWEVER, TO IDENTIFY MOST-SALEABLE ITEMS.

F. SECURITY EQUIPMENT AND SYSTEMS: JUNE 1975 LTC SHOW FEATURINE THIS THEME WAS UNQUALIFIED SUCCESS, DRAWING IMPRESSIVE OVERSEAS AUDIENCE AS WELL AS UK BUYERS. US HAS DESERVED REPUTATION FOR LEADERSHIP IN SECURITY FIELD, AND PROBLEMS FAMILIAR TO US SCENE OVER PAST DECADE ARE COMING INTO PROMINENCE IN BRITAIN AND ON THE CONTINENT, WITH SHOP-LIFTING, EMPLOYEE DISHONESTY, INDUSTRIAL ESPIONAGE, ETC., AT ALL-TIME HIGH. GROWING INCIDENCE OF SECURITY-RELATED SHOWS REINFORCES OUR VIEW THAT THIS IS HIGHLY-PROMOTABLE THEME; PROPOSED TIMING HOWEVER, PLACES EVENT COMFORTABLY WIDE OF SEP. 1977 EUROPROTECTION SHOW IN PARIS. BECAUSE MARKET IS GROWING AND DEVELOPING RAPIDLY, MARCH 1974 RESEARCH WILL NEED UPDATE.

G. AUTOMATED BUSINESS EQUIPMENT: EMPHASIS PLANNED IS ON COMPUTERIZED OFFICE EQUIPMENT (ESPECIALLY TYPEWRITERS AND DICTATION SYSTEMS) AND ACCESSORIES THERETO; ADVANCED ACCOUNTING SYSTEMS; AND NEW EQUIPMENT FOR UNCLASSIFIED

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PROCESSING, COPYING MOVING OR STORING BUSINESS RECORDS AND CORRESPONDENCE. THEME APPEARS NATURAL FOLLOW-UP TO MINICOMPUTER SHOW SET FOR JAN. 1976. LATEST STUDY ON UK BUSINESS EQUIPMENT AND SYSTEMS MARKET (JUNE 1975) SHOWS IMPORTS RISING 14 PERCENT ANNUALLY TO REACH 540.1 MILLION DOLLARS BY 1979, AT WHICH TIME TOTAL CONSUMPTION WILL BE 1.05 BILLION DOLLARS. US SHARE OF IMPORT MARKET IS SEEN TO GROW AT 17 PERCENT ANNUALLY, TO PEACH 95.7 MILLION DOLLARS IN 1976. SEE IN PARTICULAR SECTION IN STUDY ON WORD-PROCESSING CENTERS.

H. CATERING AND CONVENIENCE-FOOD SERVICES AND EQUIPMENT: EMPHASIS HERE IS ON LABOR-SAVING, RAPID AND SELF-SERVICE PORTION-PACK SYSTEMS, ETC., REFLECTING CHANGES IN UK RESTAURANT AND HOTEL INDUSTRIES, AND EAGERNESS OF PLANT OWNERS TO TURN OVER FOOD-SERVICE RESPONSIBILITIES TO INDUSTRIAL CATERERS (WHO, AS

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MEMBERS OF HIGHLY-COMPETITIVE INDUSTRY, NEED TECHNOLOGICAL LEADS TO SURVIVE). DEVALUED POUND HAS MADE

BRITAIN EXCEPTIONALLY ATTRACTIVE TOURIST GOAL, AND FOOD-SERVICE INDUSTRY WILL NEED TO RE-EQUIP TO HANDLE LESS-AFFLUENT BUT MORE NUMEROUS EUROPEAN TOURIST POPULATION. CONTRACT MARKET RESEARCH RECOMMENDED.

I. PLANT ENGINEERING AND POLLUTION CONTROL: EXCELLENT RECEPTION GIVEN LTC OFF-SITE CATALOG SHOW AT PEMEC IN SEPTEMBER CONVINCED US THEME IS READY FOR MORE ELABORATE FOLLOW-UP EVENT. UK INDUSTRY DELAYING NEW FIXED INVESTMENT, AND FIRMS MUST MAINTAIN EXISTING EQUIPMENT IF THEY ARE TO STAY IN BUSINESS. AT SAME TIME, PUBLIC PRESSURES FOR ENVIRONMENTAL CONTROL UNRELENTING, AND GOVERNMENTS RELUCTANTLY MUST ENFORCE ANTI-POLLUTION LAWS ENACTED IN HAPPIER ECONOMIC CIRCUMSTANCES. MCT. 1974 MARKET RESEARCH SAW IMPORTS OF ANTI-POLLUTION EQUIPMENT RISING TO 29 MILLION DOLLARS IN 1978, WITH US HOLDING ABOUT 27 PERCENT OF IMPORT MARKET. BROADER AREA OF PLANT-MAINTENANCE EQUIPMENT IS STATISTICALLY PERPLEXING BUT SHOULD AMOUNT TO SEVERAL TIMES THAT AMOUNT. THEMES NICELY MATE IN THAT PURCHASER-DECISION MAKER, IN MOST CASES, WOULD BE THE SAME COMPANY OFFICIAL.

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J. COMPUTER-AIDED DESIGN(CAD) G.T. MURRAY ASSOCIATES SEPT 1973 UPDATE STUDY UNDERLINES IMPOSSIBILITY OF RELATING UK OFFICIAL STATISTICS MEANINGFULLY TO CAD FIELD; SAME HOLDS OF US EXPORT FIGURES. EVIDENT HOWEVER THAT UK IS VITAL MARKET FOR US COMPUTER AND RELATED EQUIPMENT: 291 MILLION DOLLARS OF EXPORTS IN 1974, UP 33 PERCENT FROM PREVIOUS YEAR. SCOPE OF CAD USE IS BROADENING SIGNIFICANTLY WITH EQUIPMENT MOVING FROM R & D TO PRACTICAL USAGE, PARTICULARLY AS RAPID ACCEPTANCE OF NEW, SMALLER COMPUTERS PRESENTS NEW OPPORTUNITIES FOR CAD PERIPHERALS. CHAPTERS 5, DEVELOPMENT OF CAD MARKETS, AND 6, EQUIPMENT MARKET OF MURRAY STUDY ARE ESPECIALLY PERTINENT; LATTER CHAPTER LISTS (APART FROM MAJOR US MAINFRAME MAKERS) 16 US EQUIPMENT COMPANIES ACTIVE IN UK MARKET AT THAT TIME. RECENT ISSUE OF "FINANCIAL TIMES" NOTES THAT INTERNATIONAL INSTITUTE OF APPLIED SYSTEMS ANALYSIS GLOBAL STUDY OF CAD FACILITIES FOUND UK TO BE ONLY NATION WITH CAD POST-GRADUATE PROGRAM AT MASTERS DEGREE LEVEL. BELIEVE CAD EVENT WOULD OFFER EXCELLENT OPPORTUNITY FOR US NTM FIRMS IN BOTH HARDWARE AND SOFTWARE FIELDS.

K. BUSINESS AND AGRICULTURAL AIRCRAFT & ACCESSORIES: CRANFIELD SHOULD CHOSEN BY VIRTUE OF PROVEN PERFORMANCE OF ORGANIZERS, "FLIGHT INTERNATIONAL" MAGAZINE, PART OF

GIANT INTERNATIONAL PUBLISHING CORP. SITE IS 90 MINUTES FROM (TRADE CENTER) BY CAR. US EXPORTS TO UK OF "PERSONAL UTILITY AIRCRAFT" FELL BY 10 PERCENT (TO 9.8 MILLION DOLLARS) IN 1974, ALTHOUGH SALES OF LARGER (3,000 POUNDS AND OVER) MULTI-ENGINE PLANES STAYED FIRM. IMPOSSIBLE TELL WHAT PORTION OF US AVIONICS EXPORTS TO BRITAIN (49 MILLION DOLLARS IN 1974) WENT TO THESE LIGHTER AIRCRAFT, BUT FACET OF UK USED-AIRCRAFT BUSINESS CERTAINLY IS UPGRADING OF OLDER AIRPLANES WITH NEW NAVAIDS AND OTHER EQUIPMELT. SPECIAL NEEDS OF NORTH SEA OIL-CONNECTED FIRMS, GRMWING AWARENESS OF ECONOMICS OF BUSINESS AVIATION, AND ADVANTAGES OF LOW-VOLUME, HIGH-VALUE CARGO SHIPPING BY AIP (FOR ELECTRONICS FIRM EXPORTING TO

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CONTINENT, FOR EXAMPLE) ARE REASONS TO BELIEVE LIGHTER AIRCRAFT HAS IMPORTANT ROLE TO PLAY. US IS SUPREME IN DEVELOPING LIGHT, EXECUTIVE AND AGRICULTURAL AIRCRAFT, BUT NEEDS MISSIONARY EFFORT TO REACH WIDER RANGE OF POTENTIAL CUSTOMERS.

4. WE WOULD NOTE THAT WITH 3 EXCEPTIONS ALL ABOVE EVENTS CONNECTED WITH CCP CAMPAIGNS. ALL EXCEPT CATALOG SHOW AND CONSUMER EVENTS (CONSUMER GOODS HAVE SPECIAL STATUS OF THEIR OWN) ARE TARGET INDUSTRIES OR CONTAIN IMPORTANT ELEMENTS OF THOSE INDUSTRIES. SEVEN

OF NINE FY 1977 BEST PROSPECTS ARE REPRESENTED, EIGHTH (PACKAGING/BOTTLING) HAVING BEEN ADVANCED TO FY 1976 PROGRAM. (INSTRUMENT SHOW IS HOLDOVER FROM FY 1976 CCP). EXCEPT FOR AGRICULTURAL MACHINERY CATALOG-SHOW AND CATERING AND CONVENIENCE FOODS; SERVICES AND EQUIPMENT EXHIBITION, POST HAS ON HAND AT LEAST ONE CONTRACT MR STUDY FROM 1973 ONWARD AND, IN MAJORITY OF CASES, TWO OR MORE RECENT STUDIES. UP-COMING GLOBAL MARKET RESEARCH SUBJECTS SCHEDULED PER USDOC 13605 INCLUDE COMPUTERS AND PERIPHERALS, EQUIPMENT AND COMPONENTS FOR ELECTRONICS INDUSTRY, AND AVIONICS/ AVIATION SUPPORT EQUIPMENT MARKET RESEARCH; ALL SHOULD BE COMPLETED IN TIME TO BE USEFUL FOR PROPOSED SHOWS.

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5. REQUEST USDOC COMMENTS IN ORDER POST MAY PREPARE SCHEDULE OF SUBJECTS FOR FY 1976 LTC ANNUAL- CONTRACT RESEARCH PROGRAM.

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